

Workforce Planning Leadership: Roles, Resources & the Planning Team

Introduction

Workforce planning may be initiated from various parts of an organization -- the Executive level, the Management team, or it may evolve from a strategic planning process. It may be stimulated by the need for reorganization due to external factors (economic downturns, changes in the regulatory environment, available workforce, technology, etc.), or internal factors (changes in appointed or elected positions, unexpected turnover, a new or revised strategic plan, etc.). Sometimes the initiative for workforce planning will come from outside your span of control. (E.g. High level deliberations between Human Resource officers, labor representatives and/or legislative bodies may also result in an agreement to look into the future for staffing needs.)

Leadership

The initiative for workforce planning can come from many places, but the organization's leaders are always responsible for the spirit, direction, and ultimately the results of the process.

Organizational Leadership in Workforce Planning

The Leader of the Organization

- Holds and communicate a unified vision:
 - Ensures a strong link between the workforce plan and the overall organizational mission and vision
 - Maintains a positive, energetic, “can-do” attitude toward the process
 - Communicates and reinforces the benefits to be gained from planning
 - Assures all involved that the resources needed to complete the planning will be provided (and then provide those resources)
 - Holds all accountable for their part
 - Leads and maintains a creative approach to providing rewards and recognition throughout the process
 - Maintains visibility and communication throughout process
- Listens to people at all levels of the organization, and receives feedback openly
- Provides high-level facilitation of the process (and/or works directly and indirectly with consultant, if used)

The Management Team

- Maintains unity as a team under the vision/mission being held and communicated by the leader
 - Ensures a strong link between the workforce plan and the overall organizational mission and vision
- Communicates the vision/mission to middle managers, and provides excellent information and communication to them throughout the process
- Formulates the Workforce Planning teams
- Participates at a high level in the process

The Middle Managers and Supervisors

- Communicate between their direct reports and the management team

- Hold leadership roles on some of the workforce planning teams
- Are positive and energetic
- Provide excellent listening and reflection with employees, particularly those with questions and concerns
- Are team players with each other, and reach across divisions and departments for cooperation
- Are active planners and implementers
- Are the key players in the gathering and dissemination of information for the workforce planning process
- Manage human and material resources to support the workforce planning process; request and disburse resources
- Use the planning process to generate greater alignment between the staff, their work, and the strategic goals of the organization

The Finance Staff

- Ensure correlation between the budget, budget projections, and workforce planning
- Are primary researchers, with the HR staff, for gathering and disseminating financial, budgetary and personnel data and information for the workforce planning process
- May hold leadership roles on workforce planning teams
- Are team players with each other, and reach across divisions and departments for cooperation
- Provide subject matter expertise in the area of finance and budget

The HR Staff

- Provide support and knowledge about the current workforce
- Work closely with supervisors and managers to develop and implement workforce plans
- Are primary researchers, with the Finance staff, for gathering and disseminating financial, budgetary and personnel data and information for the workforce planning process
- May hold leadership roles on workforce planning teams
- Are team players with each other, and reach across divisions and departments for cooperation
- Provide subject matter expertise in the area of Human Resources

The Staff

- Help keep communication flowing among all employees
- Answer questions and provide information
- Serve on teams, in some cases chairing teams or committees
- Help reduce concerns about the purpose of the plan, the planning process, and/or possible outcomes.

“Do’s” and “Don’t” of Workforce Planning Leadership

<u>What Leaders Can Do to Ensure Successful Workforce Planning (DO’S)</u>	<u>What Leaders Can Do to Encumber the Process (DON’TS)</u>
Take the lead	Be invisible/absent during the workforce planning process
Communicate a clear vision	Embark on the process without creating a shared vision of the organization’s mission, vision, and the goals for workforce planning
Communicate enthusiasm and a positive attitude	Present workforce planning as a “necessary evil”; a demand from those higher in the organization; or
Provide <u>active</u> communication (live reports in meetings, short briefings for managers to provide during their staff meetings, etc.) throughout the process, to all levels of the organization	Rely entirely on <u>passive</u> communication (e-mail blasts, electronic newsletters and/or intranet) Provide little/no communication Communicate on a “need to know” basis about the process
Inspire everyone’s participation (provide time, encourage friendly competition, provide rewards and recognitions for steps accomplished along the way)	Do it all yourself
Anticipate and provide the resources needed to succeed in workforce planning, and respond to requests for resources to support the planning process	Under-resource the process Delay or fail to respond to requests from staff, managers and planning teams as the process unfolds
Be involved	Be invisible/absent during the workforce planning process
Listen and reflect	Be unclear about decision-making, or act unilaterally when teams expect to participate
Provide a consistent process with accountability built in at several stages and all levels, including leadership	Encourage shortcuts or skip steps Change the process midway without extreme need Change the process midway without input, even with extreme need Change the process midway and not tell others
Be transparent with process and outcomes	Keep stakeholders, governing bodies, and/or higher levels of the organization in the dark about the process
Be open-minded – willing to set aside one’s own preconceived ideas in order to develop the best solutions	Predetermine your outcomes and strategies and manipulate the process to match your preconceptions

Resources

Time, information, and analytical skills are the primary resources needed to create a workforce plan. Specifically:

Time

Time as a resource in workforce planning shows up in many ways:

1. Commitment, enthusiasm, energy
2. Clear support for an adjustment in normal workload expectations based on involvement in workforce planning activities
3. Realistic expectations of how long the workforce planning process is likely to take, in light of normal workload demands that cannot be deferred during the process

Information

Knowing such things as: where to look for data; what information to share and with whom; and when information is timely, are all key factors. Key things to remember:

- Ensure you have the right mix of members on your **planning team** (see below), including those who have access to key information and other resources
- Develop and implement a **Communication Plan** for the entire Workforce Planning process to ensure all stakeholders in and connected to your organization are involved and/or informed appropriately (*see [“Workforce Planning Communication Plan Sample” pdf in this section](#)*)
- Seek **input and feedback** at various steps in the process
- **Inform all stakeholders** of any changes you make in the process so they can make adjustments
- **Provide information, updates**, etc. as **early** as possible, so your stakeholders can have maximum response time
- Balance **“need to know” with “good to know.”** i.e. – Avoid giving people more information than they need, while ensuring you provide people with information that will help them feel invested, respected, and capable.

Analytical Skills

The ability to analyze and draw conclusions from the data you compile is essential to a successful workforce planning process. You will need to have three or more individuals who can examine the information about your current staffing, the current employment environment, employment trends, and your future needs. Involve your best critical thinkers in the analysis phase of the workforce planning process, regardless of their position in the organization. Similarly, if you need to invite someone outside your organization to help you strategize, invite them to join you. Your strategies will only be as strong as the analysis you bring to your planning process.

Planning Teams

Planning Team Composition

- Someone who knows what data are available through your HR department, and how to access them;
- Someone who understands the budget and financial aspects that will influence a workforce strategy into the future

- Someone who understands the classification system and labor relations, or who can interact with the classification and labor relations staff
- Someone familiar with recruiting and external workforce supply factors (higher education institutions, Dept. of Labor, etc.)
- Someone who has the authority and ability to make decisions about the process

Developing and Supporting your Leaders

In order to ensure your leaders are well supported through your workforce planning process, consider providing training and development opportunities that address the skills needed to spearhead such a process.

It may be helpful to have someone on the team who is familiar to some degree with:

- Statistical analysis
- Process planning and improvement methods
- The labor contract and the State of Vermont classification system
- Project management

Following is a list of training topics available through The Summit: Center for State Employee Development (The Summit). *Visit the [“Training and Professional Development”](#) page of this website.*

- Supervisor Development Program
- Vermont Public Manager Program
- Business process management
- Project management
- Team-building
- Communication skills (including conflict management)
- Mentoring and coaching
- Performance management
- Labor relations issues

A Final Thought

The most important role the leadership team can play in a workforce planning process is to exhibit 100% commitment to the project and unequivocal support for the staff’s involvement. With that base in place, any key skills or roles lacking among team members can be developed through training or brought in from other key stakeholders or consultants.

Leadership does not derive from a title or job description. Reinforce and reward the leadership qualities that emerge in your team, and your workforce planning process will benefit from the resulting breadth of scope, accuracy of information, and depth of analysis.